

Supporting Scholarship:


A Library / IT Partnership for Digital Citation Management

deg farrelly, Associate Librarian, Fletcher Library

Colleen Carmean, University Technology Office

Arizona State University

Electronic Resources & Libraries
Georgia Institute of Technology
March 23, 2006



This presentation describes how the Libraries and IT of Arizona State University collaborated to provide a value-added service for faculty and students.

Background

Arizona State University

4th largest university in the United States

Combined campus enrollment = 61,000

Largest single campus in the United States

ASU's Tempe campus = 51,612

President Michael Crow is advancing a model of

“The New American University”

- Including the concept of
“One University In Many Places”



One University in Many Places

Three campuses

- ASU at the Tempe campus
- ASU at the West campus
- ASU at the Polytechnic campus
- Forth campus (ASU Downtown)
opens August 2006



“One University Library in many places”

University Libraries (ASU at the Tempe campus)

- Hayden
- Music
- Nobel Science
- Art and Architecture

Law Library (also on the Tempe campus)

Polytechnic Library (ASU at the Polytechnic campus)

Fletcher Library (ASU at the West campus)

IT Structure

Central IT

Campus specific IT

- Localized support and services

Now named: University Technology Office

What led to this opportunity?

Emerged from efforts initiated by Fletcher Library in 1999

FUSS Project

- Framing User Support Services
- Series of focus groups with faculty to investigate how they access, organize, and use information

Two key questions asked in the FUSS project:

- How do you manage your information related to teaching, research, and service?
- Is there any service you think the library could offer but does not provide currently?

FUSS findings

Across the faculty there was no standard approach to organizing information

Typical faculty comments:

- *“scattered here and there”*
- *“when I receive information back from the library, I have my RA enter it in a bibliography (online)”*
- *“keep stacks of newspaper issues that may have only one article”*

Most were not adept or well organized

Typical responses

“...with great difficulty”

“...thousands of bits of paper with notes”

“Come to my office! A mess. Subject files are raided for projects”


“I don’t manage it; I am buried under it”

Some faculty were quite adept, using *EndNote*, *ProCite*, *FileMaker* or other database or bibliographic management software

Those few that were adept had thousands of citations in their databases

Asked what the Library should do

Faculty stated an ***expectation*** the Library will lead the way, keeping them informed of new opportunities and best practices



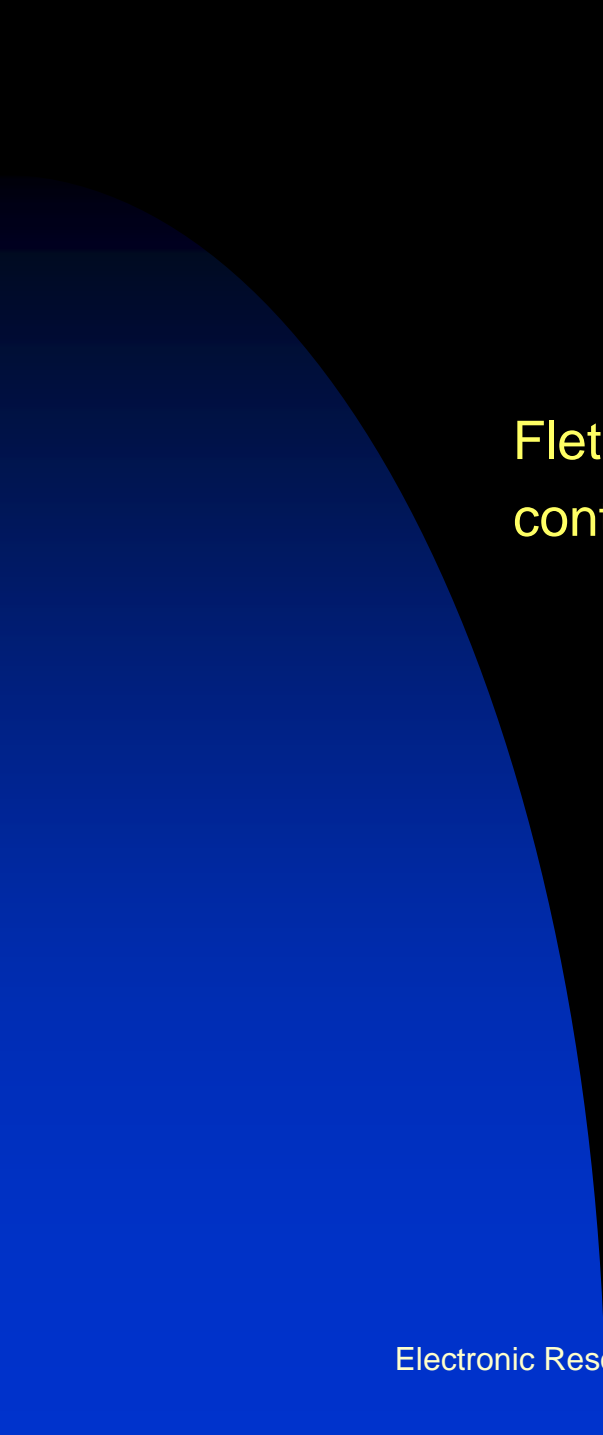
“make us aware of what’s available and how to use it”

“Library needs to stay ahead of trends”

Results of the FUSS Project

Data from FUSS Project lead to Fletcher Library's
“New Models of Service”

- Desktop delivery
- User customizable interfaces
- Information Literacy



Fletcher Library's Strategic Plan for 2004-2008
continued to build on the results of the FUSS project.

Strategic Goal C:

Support scholarship through collections,
information access, and content management

Objectives

Within that goal, a series of objectives included:

Develop, promote, support, and exploit resources to enable efficiencies of users (faculty) in information access and use.

(End user content management)

Investigate use of citation management software (*ProCite/End-Note*) on campus.

Faculty Expectations of IT

Independent research by ASU's West campus IT research also found a thread of cultural expectation:

IT would research and support technology innovation that assisted instructors, researchers and learners in knowledge management.

Specifically:

Faculty expressed strong need to better manage
electronic information, and

to assist learners in sorting and formatting their
scholarly bibliographic references.

IT Investigation

In 2004 ASU's West campus IT initiated a research pilot on site licensing for citation management software

- *EndNote*

Could not reach consensus on key elements:

- Product (*EndNote*, *ProCite*, etc)
- Value (cost of campus-wide training, support, etc.)
- Level of support for client-based site license

Software support

- Full
Cost paid by IT, will come to office, train, trouble-shoot, etc.
- Shared cost
IT pays for 25%, offers assistance 'as time available'
- Minimum
Site-license collaboration, no support

Library Investigation

In Fall 2004, Fletcher Library learned of and began investigating *RefWorks*

- Trial initiated, November 2004

Investigation at the University level

Independently, University Libraries begins to investigate bibliographic management software

Learns that Fletcher Library is already running a trial of *RefWorks*

Task Force established

Under auspices of University Libraries

- John Howard, Associate Dean for Technology establishes Task Force to research and recommend a system-wide service for bibliographic management software
- Invites participation and representation from across the University

Task Force Composition

Representation from key stakeholders in University libraries and IT

University Libraries:

- John Howard, Associate Dean for Technology
- Vicki Coleman, Associate Dean for Services
- Phil Konomos, Library IT
- Jennifer Duvernay, Web librarian
- Yuwu Song, Noble Science Library

Other campuses

- Ellen Welty, Polytechnic Library
- deg farrelly, Fletcher Library
- Colleen Carmean, West campus IT

More Task Force

University Technology Office

- Jim Casey, University Technology Office
- Ruvi Wijesuriya, Blackboard support

Points of Investigation

Task Force work included

- Comparing alternative products
- Benchmarking site installations
- Issues of integration with current web services
- Cost

Integration Issues

Integration with Blackboard Authentication

- During trials used Group Code
- By roll-out proxy server interface

Shared Cost

ASU Libraries and IT split cost

- Academic computing budget
- Library budgets

West IT contributes a portion of its operational budget to the University academic computing budget

Fletcher and Polytechnic libraries pay based on percentage of overall University enrollment

- For FY 2006 Fletcher share is @11%

Implementation and Roll Out

In order to expedite immediate implementation
Fletcher Library funded total cost for the
last quarter of FY 2005

- Allowed Fletcher build on momentum of trials
- Advanced the Strategic Plan
- Provided time with the product for ASU Libraries to become familiar with product and to plan full roll-out in Fall 2005

Implementation Planning

With decision to license RefWorks Task Force role shifted to implementation planning:

- Configuration
- Authentication
- Publicity
- Training
- Support
- Maintenance

Configuration

Locally determined identifying characteristics

- User Type
- Area of Focus

New User Information

**New User Information
for
Arizona State University**

(All fields are required)

Your Name:

Login Name:

Password:

Re-enter Password:

E-Mail Address

Type of User
Select a User Type ▼

- Select a User Type
- Faculty Member
- Graduate Student
- Researcher
- Undergraduate Student
- Staff/Employee
- Other

**New User Information
for
Arizona State University**

(All fields are required)

Your Name:

Login Name:

Password:

Re-enter Password:

E-Mail Address

Type of User
Select a User Type ▼

Area of Focus
Select a Focus Area ▼

- Select a Focus Area
- Arts & Humanities
- Business
- Education
- Health Sciences
- Human Services
- Interdisciplinary Studies
- Law
- Medicine
- Nursing
- Other
- Science & Technology
- Social Sciences
- Other

[Page of RefWorks](#)

© 2006 Ref

Authentication

Single sign-in via ASU Portal (Blackboard) was not possible

Options for remote use:

- Group Code
- Proxy Server

Logging In

Institution-Wide Subscribers

Access www.refworks.com/refworks and then enter your personal Login Name and Password. (First-time users need to sign up for an individual account following the screen prompts.)

NOTE: Remote users, accessing RefWorks from off-site or from a non-registered IP address, must either enter the "Group Code" prior to the personal Login name and Password or log in via the institution's proxy server.

Logging In

Access www.asu.edu/refworks

Login with your
ASURITE ID and Password

Publicity

Multi-tiered approaches to students and faculty

- Students
- Postcards
- Flyers
- Posters
- Newspaper
- Bookmarks

Publicity - Students

- Direct mail postcards
- Flyers
- Posters
- Newspaper
- Bookmarks

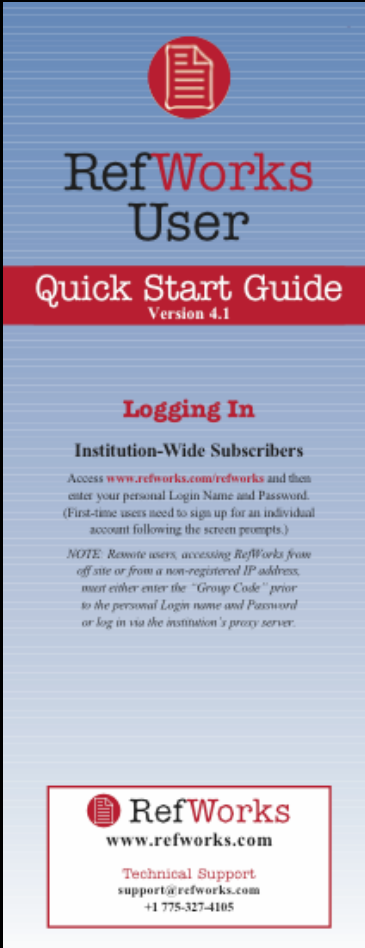
Most of these materials were developed by University Libraries staff, reviewed by the Implementation task force, and provided to IT and Libraries at the other campuses.

Publicity - Faculty

In addition to flyers, bookmarks, posters, and newspaper articles, the new service was promoted to faculty via:

- Direct email announcement
- Announcements in faculty forums:
 - Senate
 - Deans' Councils
 - ITAC West
- Direct mail of customized *Quick Start Guide*

Quick Start Guide




RefWorks User
Quick Start Guide
Version 4.1

Logging In

Institution-Wide Subscribers

Access www.refworks.com/refworks and then enter your personal Login Name and Password. (First-time users need to sign up for an individual account following the screen prompts.)

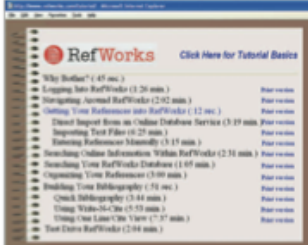
NOTE: Remote users, accessing RefWorks from off site or from a non-registered IP address, must either enter the "Group Code" prior to the personal Login name and Password or log in via the institution's proxy server.

 **RefWorks**
www.refworks.com

Technical Support
support@refworks.com
+1 775-327-4105


Need More Help?

Online Tutorial



A tutorial providing explanations of various RefWorks functions is available online. Use the **Help** pull-down menu to access the tutorial.


Support



Online
Use the **Help** pull-down menu to access detailed instructions, frequently asked questions, administrator tools, and much more.

E-Mail
Send questions or problems to support@refworks.com.

Phone
Contact RefWorks Technical Support at +1 775 327 4105.

 **RefWorks**

Training and Support

Basic user training and support built into the RefWorks product and license:

- Tutorial
- Quick Start Guide
- E-mail assistance

Other support provided by both Libraries and IT

Library and IT Training and Support

University Libraries web developers built basic information web pages

Fletcher Library links to these pages

Ask a Librarian

24/7

chat | email | phone

Need Help?

Finding Information
Connecting from Off-Campus
Report a Technical Problem
Suggestion Box
Search This Site
Visitor Information
Library Maps & Tours

Other ASU Links:

Blackboard
EMMA
MyASU
The New American University
ASU Home

RefWorks Bibliographic Management Software Quick Start Guide

Connect to RefWorks

About RefWorks

RefWorks is a user-friendly database system that allows you to manage your citations via the Web. It is now site-licensed for Arizona State University students, faculty, staff and affiliates. With RefWorks, you're able to create, search and maintain your own personal citations database. These citations can then be easily inserted in papers or publications, and are automatically added to bibliographies in multiple citation styles. [More information about RefWorks](#)

Accessing RefWorks

Use of RefWorks requires users to sign up for an individual account at their Website. Keep your Refworks UserID and password handy, and always authenticate from off-campus by entering through the ASU [authentication page](#). First-time users must subscribe for an individual account from this page before accessing your citation management software.

Keep your UserID and password safe! ASU does not have access to the RefWorks system to reset passwords. If you lose your password, follow the reset link on the [authentication page](#).

Creating Your Citations Database

Once logged into RefWorks, there are a number of ways to enter your citations:

- manually via the RefWorks *References* menu
- automatically via most *ASU Libraries online resources*: follow the RefWorks online help for each of the direct-import vendor resources supported. The list of currently supported databases and import instructions for each vendor resource is available from the RefWorks site Help Index (Building Your Database, Importing from a Text File, Exporting from a Data Service).
- *ASU Libraries online catalog entries* can be searched and added to your citations database

Refworks Guides

- Setting up Refworks Accounts
- Adding a reference manually
- Export/Import from databases
- Importing EndNote databases
- Searching/Importing from PubMed
- Importing from IEEE Xplore and Web of Science
- Importing from GeoRef
- Downloading/Using Write-n-Cite for Windows | for Mac

Library and IT Training and Support

Individual campus library and IT operations established local service levels.

At ASU's West campus Library support

- Provided through Liaison program
- Reference Desk service to
 - Establish user account
 - Import/export records into personal database

Library and IT Training and Support

At ASU's West campus IT support

- Provided on request through consultants program
 - Including classroom instruction
- Technopolis (Computing Commons)
- Installation of "Write-n-Cite" plug in on all public stations on campus.

Support, continued

ASU's West campus IT wrote content for University Libraries web page content

- Using and configuring “Write-n-Cite”

RefWorks: Write-n-Cite

What is Write-n-Cite?

Write-n-Cite is a utility that allows you to cite your sources from within a Microsoft word document. It will format both the in-text citations, and the reference list/bibliography automatically.

Downloading Write-N-Cite

First log into [RefWorks](#). From the Refworks screen, choose Write-n-Cite from the "Tools" menu.



A new window will pop up. From that window, choose the download appropriate for your computer, either Windows or Mac.

Download Write-N-Cite

To use Write-N-Cite with RefWorks you must download a small utility

For the Windows version, [click here](#) to start the download (336K).

For the Mac version, [click here](#) to start the download (199K).

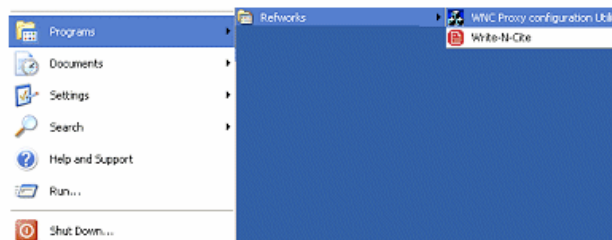
Refworks Guides

- [Setting up Refworks Accounts](#)
- [Adding a reference manually](#)
- [Export/Import from databases](#)
- [Importing EndNote databases](#)
- [Searching/Importing from PubMed](#)
- [Importing from IEEE Xplore and Web of Science](#)
- [Importing from GeoRef](#)
- [Downloading/Using Write-n-Cite for Windows | for Mac](#)

Using Write-N-Cite from Off Campus

ASU authenticates to RefWorks through a proxy server, rather than the RefWorks Group Code. This means you must load the WNC Proxy Configuration Utility to access Write-N-Cite from off campus.

- From the Start Menu select Programs and RefWorks

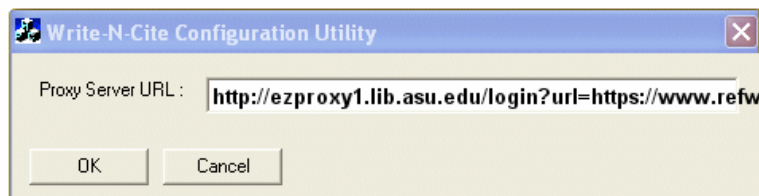


- Select the WNC Proxy Configuration Utility

- Enter

<https://ezproxy1.lib.asu.edu/login?url=https://www.refworks.com/Refworks/?WNC=true>

- Click OK



After running the utility, when you launch Write-N-Cite you will be directed to the organization's proxy server to login rather than going directly to RefWorks. (Note: Mac users need to restart Write-N-Cite for this proxy configuration to take effect.) For more information, or if you have trouble logging into ASU's proxy server, please contact a [librarian](#).




Support, continued

University Libraries provided additional web page content

- Direct Export from Databases



Reworks: Direct Export from Article Databases

Some of the library's resources allow for "direct exporting" of references to Refworks. These resources allow you to send article citation information straight into your Refworks account:

Publisher	Database	Look for
ABC-CLIO	America History & Life Historical Abstracts	Output options button: 
BioMed Central	BioMed Central	From search results screen, Send button: 
BioOne	BioOne	Create Reference" link: [Create Reference]
CQ Library	CQ Researcher CQ Weekly	Cite Now link: 
CSA	Sociological Abstracts Linguistics & Language Behavior Abstracts Ecology Abstracts	Refworks link: RefWorks

Reworks Guides

- Setting up Refworks Accounts
- Adding a reference manually
- Export/Import from databases
- Importing EndNote databases
- Searching/Importing from PubMed
- Importing from IEEE Xplore and Web of Science
- Importing from GeoRef
- Downloading/Using Write-n-Cite for Windows | for Mac



Ebscohost	Academic Search Premier Alt Health Watch Environmental Issues and Policy Index	Save link:  Save ...then "Bibliographic Manager" tab: Bibliographic Manager
Engineering Village 2	Compendex	Download button: Download
Project Muse	Project Muse	Email/export saved results button: Email/Export Saved Results
OCLC	Worldcat	Export button:  Export
ProQuest	ABI Inform Ethnic News Watch Wall Street Journal Barrons	"Marked list" tab Marked List : 2 documents My Research Summary

Fletcher Library links to these, and other pages through its uniform access to databases interface - “About” pages.

Fletcher Library – Database Finder About Page

http://library.west.asu.edu/dbfinder/about.cfm?PK_Products_Autc

Google ASU Libraries: Online... TinyURL ASU West Library Intr... Outlook BEAR411 Yahoo! Groups Scrabble AOL Scrabble tools icdeg >>

[Home](#)
[Library Catalog](#)
[Article Databases](#)
[How Do I...?](#)
[My Account](#)
[Hours](#)
[Site Search](#)

RefWorks

➔ **Connect** [On Campus](#) | [Off Campus](#)

Alternate Title	
Coverage	N/A Updated: Unknown
Description	RefWorks, a licensed web-based bibliography and database manager, allows users to create their own personal citation/abstract database by importing citations from online databases or text files. Users can import references to papers and automatically format citations and bibliographies in multiple citation styles. (catalog record) View extended description .
Subject	General / Multidisciplinary
Product Type	LibrarianTools
Includes	
Datasource	RefWorks
Vendor	Cambridge Scientific Abstracts
Access	Library subscription; Available from off-campus
On-Campus Url	http://www.asu.edu/refworks
Off-Campus Url	http://www.asu.edu/refworks
Related Print Materials	

Important Notice

Electronic resources are owned by independent providers and are protected by copyright and other laws. They are provided for ASU students, faculty, staff and library users only.

You must:

- Use the resources for personal, educational or research purposes only
- Check the provider's website for permitted uses and restrictions
- Comply with restrictions on use, copying, reproduction, distribution and alteration

You must not:

- Systematically or programmatically or massively copy any of these resources
- Distribute these resources beyond ASU faculty, students and staff
- Sell or otherwise make commercial use of the resources

ASU is not responsible for the content, format, accuracy or availability of electronic resources.

Related Print Materials

Extended Description

Use of RefWorks requires users to "Sign up for an Individual Account".

- [Sign up for an Individual Account](#) - Required for first time users.
- [Quick Start Guide](#)
- [Using Write-n-Cite](#)
- [Write-n-Cite from Off Campus](#)
- [Direct Export from Article Databases](#)
- [More information about RefWorks](#)

Training

Library took the lead on training

- Librarians and Staff
 - “Train the Trainer” workshop
- Students
 - Course-integrated instruction
- Faculty
 - Faculty Development Workshops

“Train the Trainer”

Provided on-site by CSA

Included

- Librarians
- Reference Desk Staff
- IT Consultants
- Unit Technology Specialists
- Writing Center Staff

Students

- Individual subject librarians offered *RefWorks* training incorporated into bibliographic instruction
- Some specialized workshops offered within departments/majors
- Some faculty incorporated *RefWorks* into course content

Faculty Workshops

Past Workshops--Fall 2005

Library Training for Research Assistants	8/26/05
Introduction to RefWorks	8/30/05
Introduction to RefWorks	9/6/05
Retrieving Full Text Articles from Library Databases	9/16/05
Retrieving Full Text Articles from Library Databases	9/20/05
Library Training for Research Assistants	10/7/05
Your Research Impact: Tracking Citations Using Library Databases and the Web	11/8/05
Advanced RefWorks	11/15/05
Advanced RefWorks	11/18/05



Introduction to RefWorks

Date: 8/30/05

Time: 10:00 AM

Location: CLCC 244

Instructor: Leslee Shell, deg farrelly

RefWorks, a licensed web-based bibliography and database manager, allows users to create their own personal citation/abstract database by importing citations from online databases or text files. Users can import references to papers and automatically format citations and bibliographies in multiple citation styles.

Course Objectives

Participants will be able to:

- Login to RefWorks
- Set up a personal account
- Create a folder within RefWorks
- Import references
- Manage references in folders
- Generate a bibliography

Course Materials

[Intro to RefWorks PowerPoint](#)

[RefWorks Tutorial](#)

[Quick Start Guide](#)

Maintenance

Maintenance of RefWorks license maintained by
University Libraries

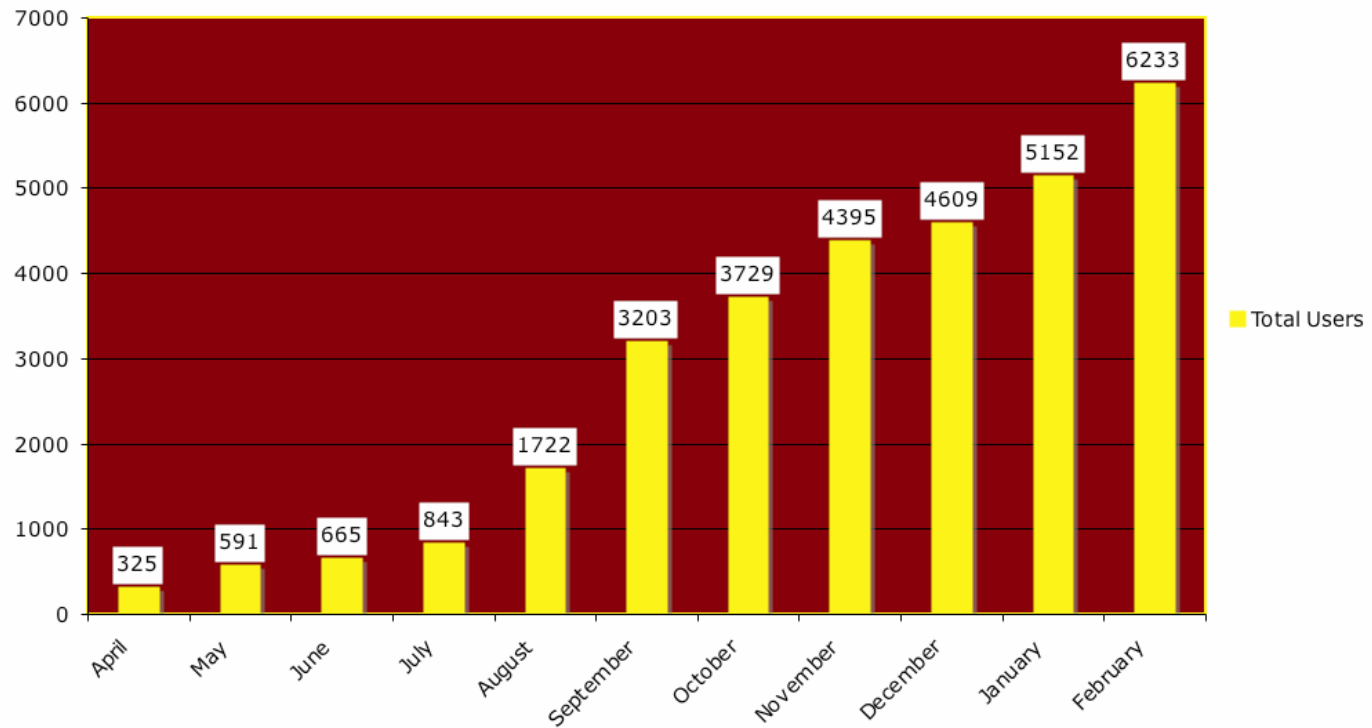
University Libraries staff maintains statistics and
account settings (as necessary)

Statistical Charts

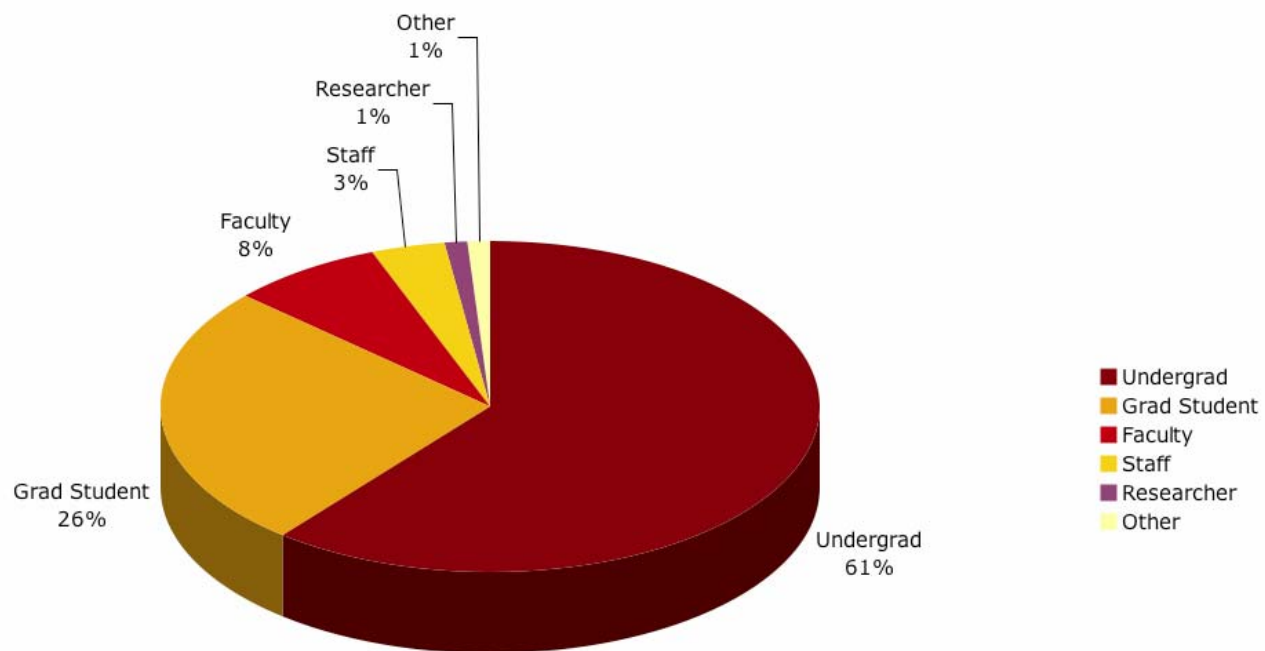
Eleven months data -
April 2005-February 2006

- Growth of User Accounts
- Users by Type
- Growth of References in Accounts
- New Accounts by Month
- References Added by Month
- Total Monthly Users

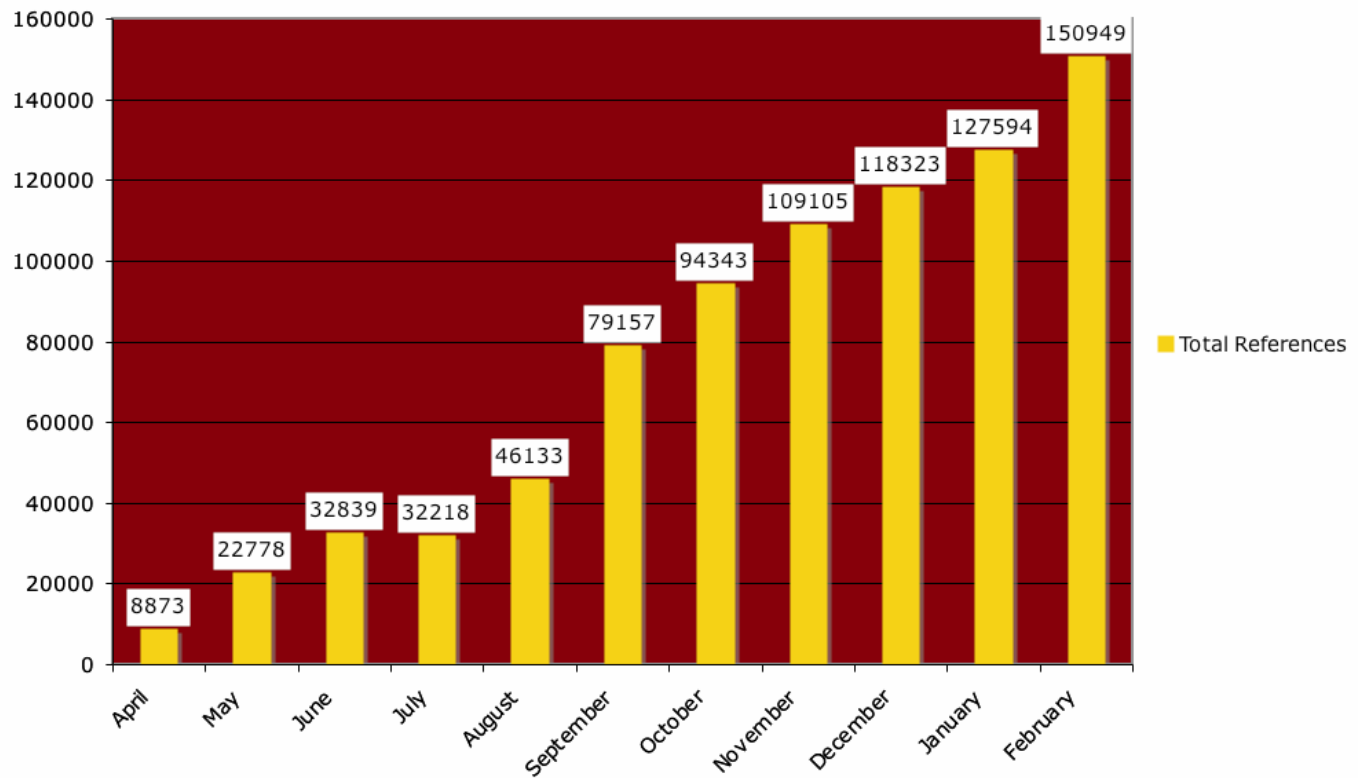
**RefWorks at Arizona State University
Growth of User Accounts
2005-2006**



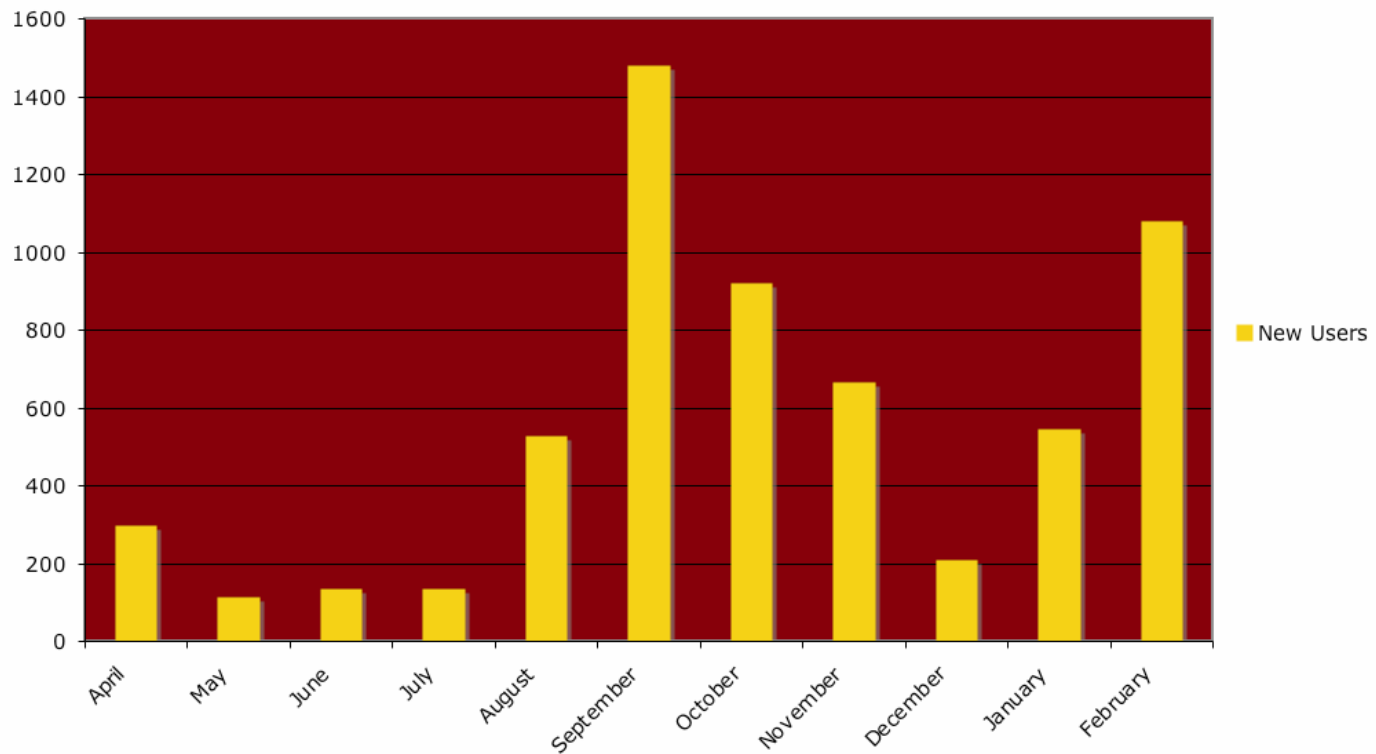
**Arizona State University
RefWorks Users by Type**



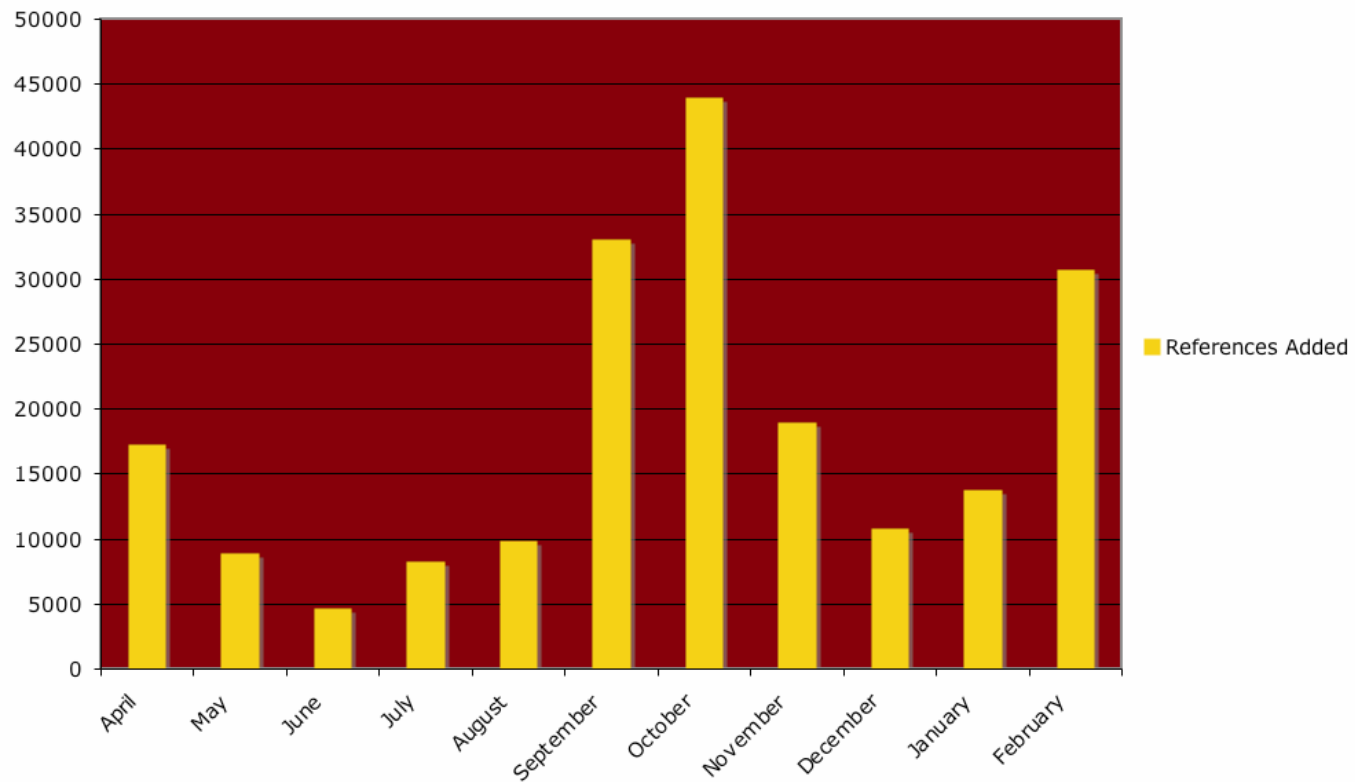
**RefWorks at Arizona State University
Growth of References in User Accounts
2005-2006**



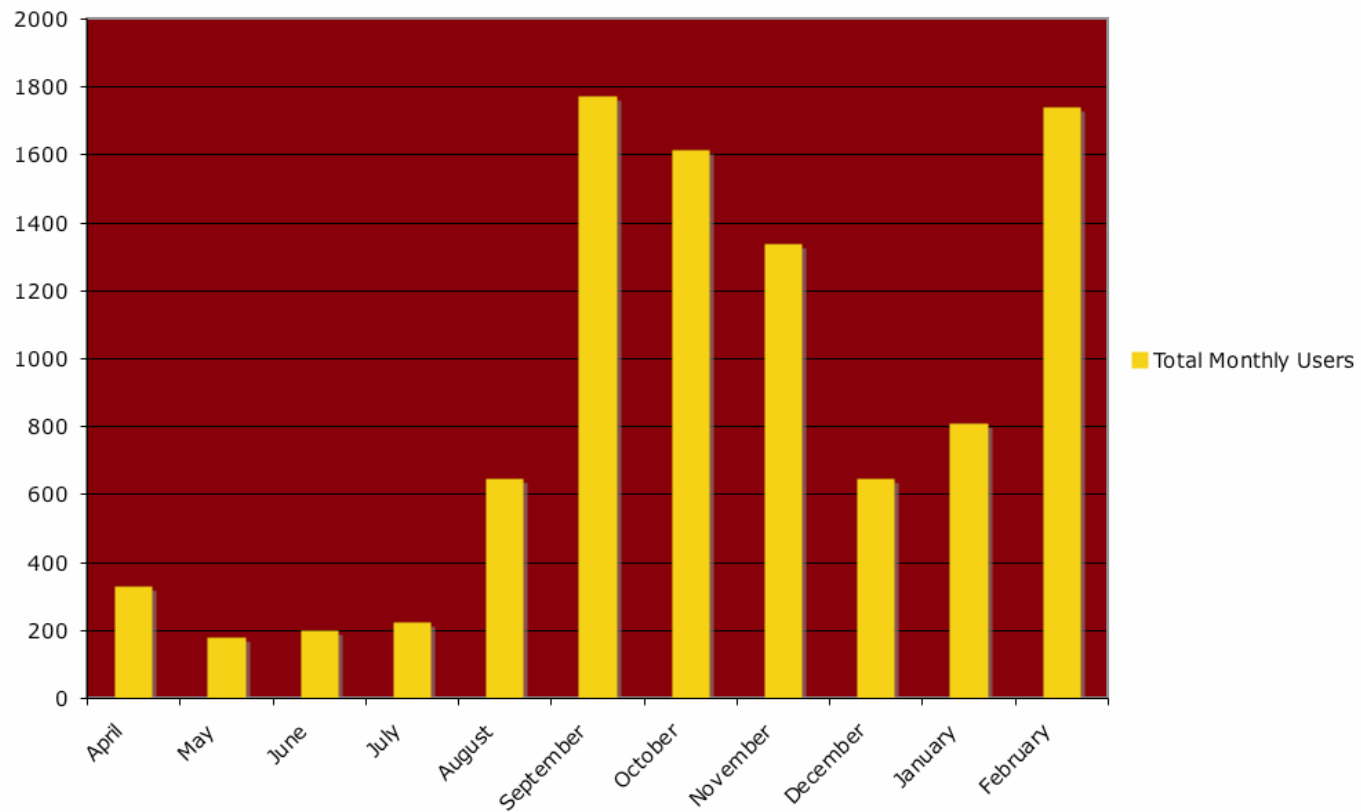
**RefWorks at Arizona State University
New Accounts by Month
2005-2006**



**RefWorks at Arizona State University
References Added, by Month
2005-2006**



**RefWorks at Arizona State University
Total Monthly Users - 2005**



Contact Information

deg farrelly, Associate Librarian
Fletcher Library
Arizona State University at the West campus
Email: deg.farrelly@asu.edu
Phone: 602.543.8522
library.west.asu.edu/

Colleen Carmean, Director
Learning Technologies
University Technology Office
Arizona State University at the West campus
Email: Colleen.Carmean@asu.edu
Phone: 602.543.8271
www.west.asu.edu/it